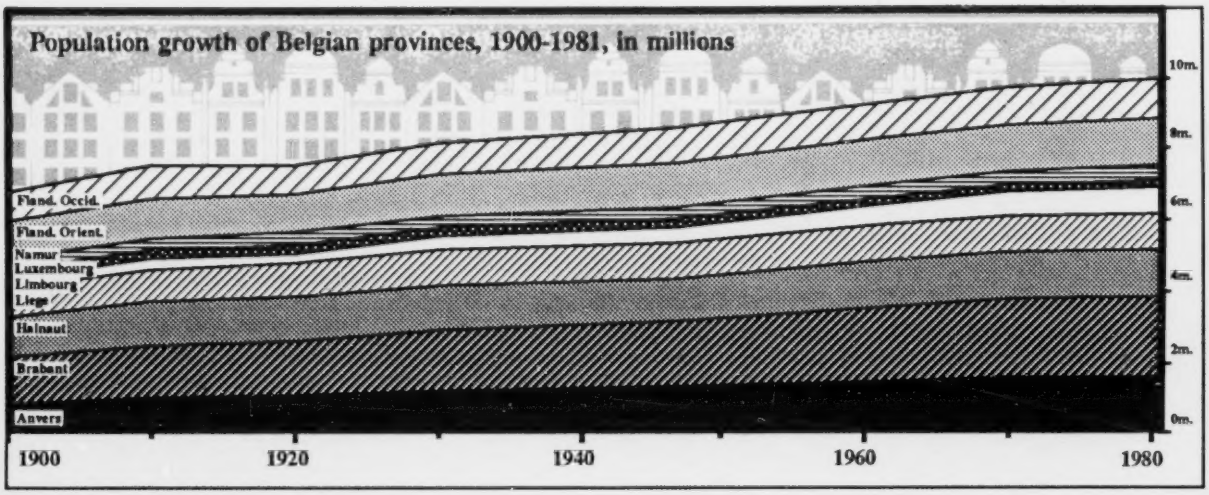
CONSUMER TRENDS AND MARKETS ABROAD
SEPTEMBER 1986 VOLUME 5, NUMBER 9

International Demographics



COUNTRY PROFILE

The Kingdom of Belgium

Your Grace, there are no Belgians. There are only Walloons and Flemings.

Prominent politician and writer Jules Destree's pronouncement to his popular king, Albert I, around the turn of the century still rings true.

Clashes have grown less violent in recent years, but nagging rivalries persist between Flemish-speaking and economically better-off Flanders in the north, with its larger share of the nation's nearly 10 million residents, and industrially ravaged, French-speaking Wallonia in the south.

Squabbling political factions within each of these two officially drawn regions heat up the national debate, and--something absent in Destree's day when French alone was the recognized language of Brussels--Flemings and Walloons are constantly at odds over representation in the government of the now bilingual capital region, itself a third lawfully designated region.

Still another voice, this time in German, figures to a lesser extent in the country's confrontational politics. In the absence of national political parties, there are dozens of local blocs with widely differing views, a condition that contributed in no small way to the fall of 37 governments since the end of World War II alone. (In the opening stages of last year's election, more than 3,500 candidates contested 318 parliamentary seats.)

People on the eastern reaches of Wallonia speak as their first language neither French nor Flemish (which is nothing more than Dutch with a Belgian accent and some added vocabulary). Too small in number to significantly alter political outcome, these German speakers have given the country a third official language.

continued

INSIDE

Belgium's bilingual advertisng scene.....6
Desktop demographics.....9
Regions: West Germany, France, Italy, Canada, Australia.....10

THIS MONTH: BELGIUM

However precariously, the Kingdom of Belgium has learned to accommodate the internecine strife it has known for most of its relatively short existence. During long spells, she has gone well beyond concern with internal problems as a forerunner of the Industrial Revolution and as a magnet attracting foreign investment. Brussels has long been the West European base for many British and American companies.

Younger than the U.S., Belgium as we know it today was created in 1830 as a constitutional monarchy and buffer state amidst great European powers. Its constitution creating a parliamentary system of government has since served as a model for many emerging democracies. Over the centuries before independence, this flat land with ocean access along major trading routes in the heart of Old Europe belonged to France, Spain, Holland, and others. Each left traces of its culture in Belgian architecture, folk traditions, cuisine, art, and commerce. An outside presence is still very much in evidence. Brussels, as the administrative seat of the European Economic Community (EEC), draws thousands of temporary resident functionaries. Belgium also houses a number of other pan-European and international organizations, including Euratom, the atomic-energy coordinating agency, and is headquarters for the North Atlantic Treaty Organization.

C O M P A R A T I V E L Y S P E A K I N G

Illustration by Diana Souza

Like its European Community counterparts, Belgium can expect a substantial increase in the proportion of elderly people in the population--from 19.6 percent in 1985 to 23.8 in the year 2000.

C O M P A R A T I V E L Y S P E A K I N G

VOTE FOR STABILITY

Belgium set aside, at least for the near future, its endemic destabilizing sectionalism. One indicator was the outcome of last October's national election. The vote--mandatory in Belgium--returned to office the center-right coalition which had held power since 1981, despite its program of tough public-spending cuts which helped halve inflation to 5 percent going into the election.

The beleaguered government of Prime Minister Wilfrid Martens--the sixth he's headed over the last eight years--seems determined to step up its austerity program regardless of a series of lengthy protest strikes last spring which severely paralyzed international rail traffic and many internal public services. Unemployment is edging downward from more than 14 percent in 1984, to just over 12 percent the first quarter of 1986.

Among other positive indications that austerity is paying off for the world's biggest per capita importer/exporter is a somewhat improved balance of payments and respectable overall economic growth of around 2.5 percent through the first half of this year, underpinned by close trading links and minimum customs formalities with neighboring Luxembourg and Holland.

Wages, however, lag behind inflation after the last government suspended an index system that mandated automatic income adjustments in line with the cost of living. In 1983, for the first time since the country's economic boom of the 1960s, purchasing power for the average Belgian declined.

CITIES AND REGIONS

About 90 percent of Belgium's estimated 9,880,000 inhabitants live in cities and towns ranging over a territory of only 30,518 square kilometers (11,750 square miles)--roughly the size of the state of Maryland. This small nation of urban dwellers has one of the highest population densities in the developed world--323 persons per square kilometer.

Administratively, the region of Flanders has five provinces; Wallonia, four. Regions are further broken down into arrondissements and communes. Flanders, with 44 percent of the country's land mass and 57 percent of its population, has 24 arrondissements, including the Brussels region; Wallonia, with 55 percent of the territory and 33 percent of the population, has 20. The northern region has 308 communes compared with 262 in the south. The German-speaking eastern part of Wallonia encompasses only 854 square kilometers (330 square miles) and is home to 57,000 Belgian nationals and 10,000 persons of other

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origin.

One out of ten Belgians lives in the Brussels metropolitan region. The population of the region's 19 communes (including the city center) run from 105,000 in the Schaerbeek commune to 16,000 in that of Koekelberg.

In addition to the capital-city region, Belgium classifies 140 other concentrations as "cities." Of these, three had populations above 200,000 in 1981: Ghent in West Flanders (239,256); Charleroi in Hainaut (222,343); and Liege (214,119). Three had populations above 100,000 in 1981: Antwerp (185,897) and Namur (102,321), each in provinces with corresponding names; and Bruges (118,020), the lovely medieval art center, also in West Flanders, called the "Venice of the North" because of its many canals.

The strength of Wallonia's coal mining and steelmaking for more than a century enabled the southern region to dominate Belgium's economic and political life. But a relatively rapid shift to other forms of energy, cheaper iron and steel imports from Japan and elsewhere, and a drawback in government subsidies have idled this sector, causing high unemployment in areas like Charleroi, the country's second most populous city. Today, commercial clout and political leverage have moved north to Flanders, where high-tech and other nontraditional industry has taken root.

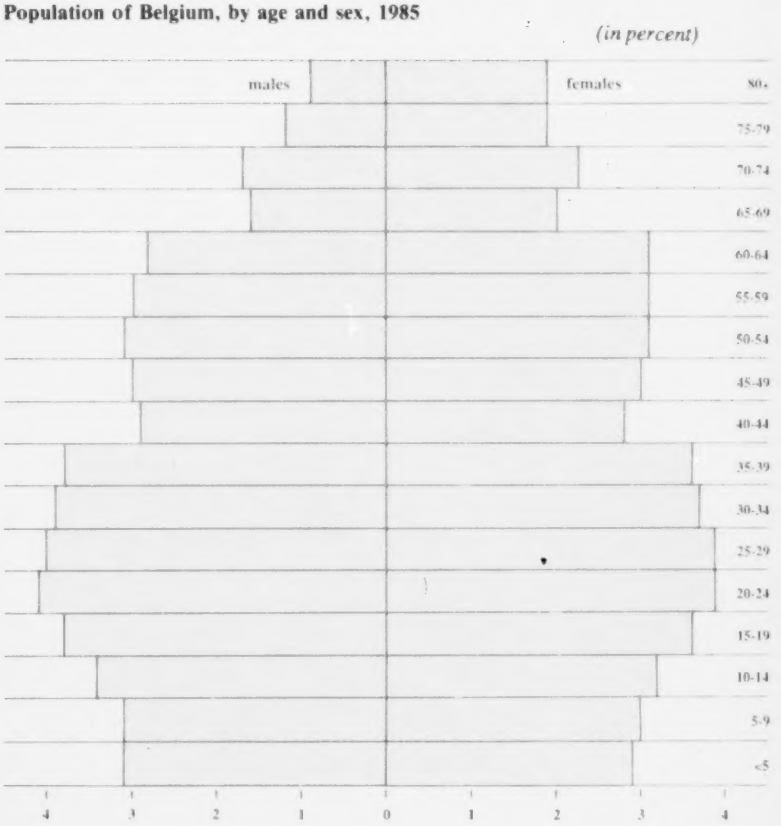
In addition, the Port of Antwerp--one of the world's busiest, handling about 80 million tons a year--lies to the north. Antwerp itself has long been one of the world's leading trading centers for diamonds and semiprecious stones. With an estimated half of the yearly trade passing through the city, it contributes about 6 percent to Belgium's annual GNP of $4.5 billion francs.

POPULATION CHANGE

Whatever its peculiarities of language, culture, and politics, Belgium shares many of the demographic trends of its Western European neighbors. Its under-replacement-level birthrate is expected to decline further (except among a large, mostly non-native working-class population), and its proportion of elderly people in the total population is expected to rise, straining even further an already overburdened system of social security and health care.

Belgium's 10-year intercensal population gain (between 1971 and 1981) was the smallest in the country's history. By early 1984, the Belgian population declined for the first time since World War II. Belgium's total population on January 1, 1984 stood at 9,853,023, a decline of almost exactly 5,000 from the preceding year, according to

Population of Belgium, by age and sex, 1985



Age Group	Both Sexes (in thousands)	Males	Females
0-4	589	302	287
5-9	595	303	292
10-14	659	338	320
15-19	729	372	357
20-24	795	405	390
25-29	778	397	381
30-34	748	382	366
35-39	726	373	353
40-44	566	288	279
45-49	585	292	292
50-54	613	302	311
55-59	601	292	310
60-64	576	272	304
65-69	352	159	193
70-74	389	164	225
75-79	299	115	1846
80+	278	91	1864
All ages	9,880,000	4,848	5,032

the country's Institut National de Statistique. INS projections peg Belgium's population falling further to 9.8 million in 1985, 9.6 million by the year 2000, and 8.8 million in 2025.

The loss of inner-city residents to outlying areas recorded in the 1971 census, however, slowed, echoing similar trends in large urban concentrations elsewhere in Europe.

declining. Those aged 5 to 15 fell from 664,900 in 1980 to 640,000 in 1982. Belgium's 30-to-59-year-olds predominate in the country's heartland--in Brabant encircling Brussels and spreading east from there. *Le troisieme age*, those 60 and older, account for an important part of the population in rural areas such as the southern part of East Flanders.

Between 1980 and 1982, the number

COMPARATIVELY SPEAKING

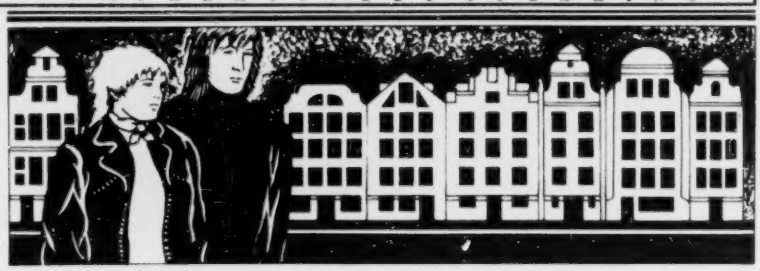


Illustration by Dana Souza

Belgium's 1985 unemployment rate of 13.2 percent was one of the highest among EEC countries.

COMPARATIVELY SPEAKING

Nearly 891,000 non-natives lived in Belgium in 1984. Their distribution is very irregular but a fair number, especially among the 60 percent from within the EEC, have gravitated toward Wallonia's hard-pressed industrial belt reaching from Moas to Liege. Non-natives from outside the EEC are concentrated in three principal areas: northwestern Antwerp Province, along a broad corridor dividing Limbourg Province, and in the Brussels region where non-natives now account for 25 percent of the region's population. This proportion is expected to reach 32 percent by 2000. Dutch dominate the non-native population (529,000), followed by Italians (280,000) and French (103,500). Other well-represented groups include Turks, Yugoslavs, and Kampuchians.

Antwerp and Limbourg Provinces are home to high proportions of young adults aged 19 to 29 (about 17 percent of the total population), and to a lesser extent, those 18 and younger. Overall, the proportion of youth in the Belgian population is

of 65-to-75-year-olds fell, but the number of 75-to-85-year-olds grew by about 11,000 to an estimated 315,600.

Flanders experienced a 4 percent population growth between 1971 and 1981. Wallonia matched the small national increase of 2 percent. The Brussels region lost 8 percent of its population, a first-ever decline which stabilized in 1985. By 1984, Flanders had about 5.7 million residents and Wallonia about 3.3 million. The population of the Brussels region in the same year declined by 7,000 to 983,000.

Significant growth was noted in the suburbs of large- and medium-sized cities, in the rural northeast, and in portions of central Flanders with traditionally high birthrates. Most of the population loss was recorded in the centers of these same cities and in isolated rural zones.

Births in Belgium slid from 141,000 in 1970 to 120,000 by 1982. Belgium's birthrate fell from 12.6 per 1,000 in 1981 to an estimated 11.7 per 1,000 in 1986.

HOUSEHOLDS AND FAMILIES

As elsewhere in Western Europe, Belgium's average household size is decreasing due to a larger aged population, an upsurge in divorces and unmarried young couples, and a declining birthrate. The largest households are found in areas of the country where the birthrate traditionally runs high. These include northeast and central Flanders, the core of the Ardennes, and the southern part of German-speaking Wallonia. In addition, higher-than-average sizes were recorded for households in suburban communes surrounding Ghent and Antwerp, southern Louvain and northern Namur, where the proportion of young married couples is high.

Although the Brussels suburbs have larger household sizes than the capital city itself, the trend toward smaller households is firmly established in this area as far south as Lasne in the part of Brabant in Wallonia and to the northeast and southwest of this province in Flanders, where size again increases. Antwerp leads Brussels on the list of cities with diminishing household size. Ghent and Liege come next, followed by Louvain, Malines, Huy, Charleroi, Mons, and Bruges.

Singles accounted for 25 percent of the Belgian population in 1981 (up 6 percent from 1971) with a growing number of young men and women living together in *union libre*. Such an arrangement, however, clashes with the conventional mores of the large Belgian middle class. A longstanding Belgian tradition, usually reserved for the upper classes in other societies, of "eligible" daughters attending a string of debutant balls, for example, continues.

In some cities, such as the Ixelles Commune of Brussels, single residents account for as much as half of the population.

LABOR FORCE

The size of Belgium's active labor force reflects in part a continued high unemployment rate and a growing

post-retirement population. About a third of the population is at work. At mid-1984 the figure stood at 3,638,000, an increase of 5,000 over the same time the previous year. By the end of 1984, 14 percent of the labor force was unemployed, a figure which declined to 12.7 percent at the end of 1985 when 542,400 were seeking work and nearly 20,000 jobs went unfilled. More than 25 percent of the unemployed were under 25.

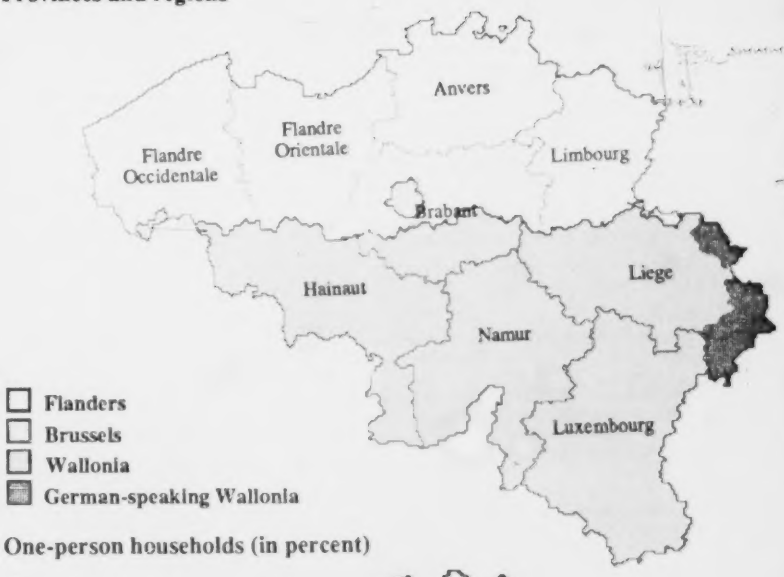
Of those at work, 2.4 percent earn top incomes, according to the Centre d'Information sur les Media in Brussels. Middle-management personnel and small businessmen account for about 23 percent of the working population; white-collar and skilled workers, 57 percent; and low-income, unskilled laborers, and those collecting pensions, 18 percent; according to CIM.

The services sector generates more than half the country's jobs. In 1984, about 2.4 million Belgians were employed in the service sector--about the same number as in 1983. Industry provided work for over 1.1 million Belgians in 1984, down from 1.5 million in 1970 when services engaged just under 2 million workers. Agriculture provided work for 174,000 Belgians 15 years ago. Today, with an eroding farm base (3.4 million acres in 1985), that figure has fallen by at least 68,000.

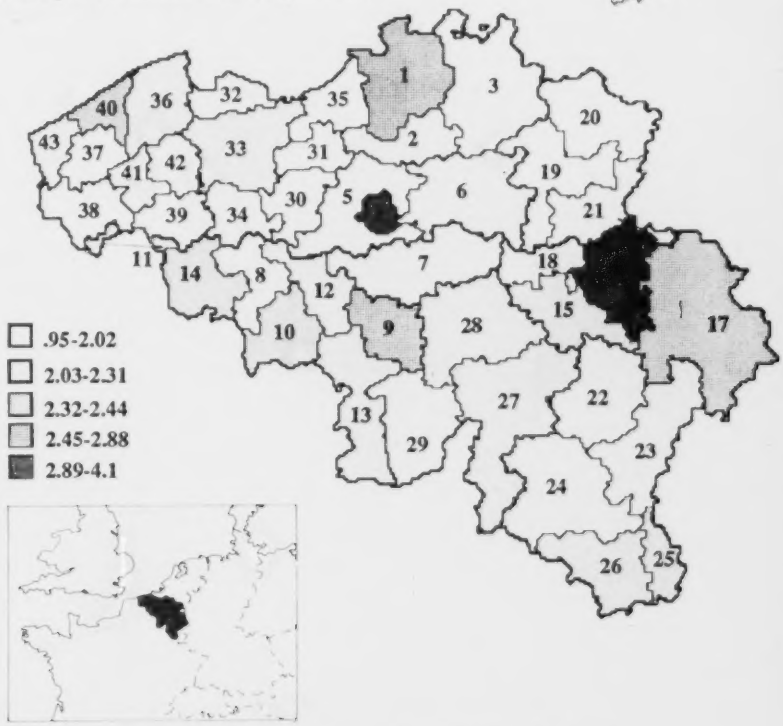
In 1984, an industrial worker could expect to earn an average of about $1,400 a month. About 50,000 white-collar workers earned an average of about $750 a month; 96,000, about $1,000; and 70,000, about $1,500. However, once deductions are made for Belgium's costly social security and high taxes, net income on a weekly paycheck of about $235 is about $137. This gap is expected to widen due to government policy eliminating tax breaks for married couples in a series of fiscal measures designed to reduce a staggering national debt by 3 percent. Belgium's debt is running at 11 percent of the GNP this year.

Consumers are also being asked to pay more in value-added tax. Belgium's VAT had been in the mid-range of those of the EEC countries, but it is being raised on many goods

Provinces and regions



One-person households (in percent)



Population gains and losses in arrondissements (1970-1981)

1. Anvers (+)
2. Malines (+)
3. Turnhout (+)
4. Bruxelles--Capitale (-)
5. Hal-Vilvorde (+)
6. Louvain (+)
7. Nivelles (+)
8. Ath (-)
9. Charleroi (-)
10. Mons (-)
11. Mouscron (+)
12. Soignies (-)
13. Thuin (-)
14. Tournai (-)
15. Huy (-)
16. Liege (-)
17. Verviers (-)
18. Waremme (-)
19. Hasselt (+)
20. Maaseik (+)
21. Tongres (+)
22. Marche-en-Famenne (-)
23. Bastogne (+)
24. Neufchateau (+)
25. Arlon (+)
26. Virton (+)
27. Dinant (-)
28. Namur (+)
29. Philippeville (+)
30. Alost (+)
31. Termonde (+)
32. Ecklo (+)
33. Gand (+)
34. Audenarde (+)
35. Saint-Nicolas (+)
36. Bruges (+)
37. Dixmude (+)
38. Ypres (+)
39. Courtrai (+)
40. Ostende (+)
41. Roulers (+)
42. Tielt (+)
43. Furnes (+)

INSIDE INFORMATION

Small, beautiful, and beastly

Belgium's bilingual advertising scene

For many pan-European advertisers, small is beautiful. Brussels, with its considerable international population, is an ideal test market for new products and services.

But Belgium's relatively small market of under 10 million inhabitants can be a double-edged sword for advertisers. Small readerships and viewing and listening audiences hold down the cost-per-thousand rate on which advertising is based. However, the costs of duplicating advertising in at least Belgium's two main languages of French and Flemish in such a small market adds to costs, according to Stef Eyckmans, general manager for KRP S.A., the Belgian branch of a New-York based ad agency specializing in medical marketing.

Eyckmans offers these tips for advertising to Belgians:

■ *The language problem for advertisers in Belgium exists at two levels.* First, the problem is more than just language; it is also cultural. The Flemish (Dutch-speakers) and the Walloons (French-speakers) consider themselves two different peoples; consequently, their approach to things and their ways of looking at things must be taken into consideration in the very fabric of the advertising campaign.

■ *Second, it is not acceptable to simply translate from French into Dutch, or Dutch into French, or from English into both.* Advertising copy must "sing" to be effective. Something that obviously looks like a translation is not only less effective, it may actually cause cultural resentment from the one group or the other. It is therefore imperative when advertising to the general public (less so when addressing professional groups) to use competent copywriters (not translators) in the two languages; copy should appear to have originated in both French and Dutch, even if it didn't. And of course you must typeset, proofread, and print in the two different languages, which inevitably increases the costs of a campaign compared to a unilingual market.

■ *The difficulties are magnified in Brussels, especially with regard to direct-mail advertising.* Whereas there are distinct French and Flemish regions, Brussels is officially bilingual. To avoid infringing both the law and sensibilities, direct-mail materials should be sent in both languages to most target groups.

■ *Finally, it is useful to bear in mind that Belgium is a small market of under 10 million.* Because of the added costs of concepts, copy, and production, advertising agencies often cannot live off media commissions alone, except for the most broadly advertised mass merchandise products. For specialty products, be prepared to pay an agency fee in addition to the traditional media commissions.

The problems of advertising in Belgium are formidable, but not insurmountable. The secret is to recognize that they exist and give adequate time (the number 1 consideration) and budget (number 2) to overcome them.

--Peter Inserra

and services to the prevalent rate in France of 33 percent. Measures such as this are increasingly forcing Belgians to tap into their savings. Unemployment benefits are also being reduced and, in contrast to the general trend elsewhere, the official retirement age for women has been raised from 60 to 65.

CONSUMPTION

Unlike the svelte French, or even the Dutch, Belgians eat heartily. Their consumption of French fries is a conspicuous national pastime--and the basis of many usually good-natured jokes the French tell about *les belges*. Stands and vans across the countryside do a brisk business dispensing *cornets*, paper cones of French fries dripping with mustard, tartar, or any of a dozen or so other sauces. The revered *frites* can even be obtained in hot portions from an automatic dispensing machine.

To wash down their French fries and mussels Belgians have another mania--beer. Breweries are steadily expanding to meet per capita consumption of 122 liters (107 quarts). Dozens of home-brewed brands like Morte Subite (literally "sudden death") compete for the local and export markets, and a fair number of beers are imported.

No wonder then that Belgians spend more on food than on any other household expenditure item. The largest share of household consumption in 1983 was on food, at 18.6 percent; expenditures on gross rent, fuel, and power followed at 17.7 percent; transport and communication, 12.7 percent; furniture, furnishings, and household equipment, 12.2 percent; medical care and health expenses, 9.2 percent; recreation, entertainment, education, and cultural services, 9.2 percent; and footwear and clothing, 7 percent.

COMMUNICATIONS AND TRANSPORT

An accommodating government policy on access to the airwaves and the world's largest cable network gives at least 70 percent of the 3.6 million Belgian households with TVs access to up to two dozen channels in six languages, including English.

Over 4 million households have radios. Two state-run TV outlets and two national radio channels broadcasting in French and Flemish prohibit brand advertising, a situation which could loosen up in the future when, it appears, Belgium will take the lead in permitting comparative advertising. French commercials are aired over Radio Television Luxembourg (RTL) whose TV signal can be picked up by about 60 percent of the Belgian population and whose radio programs reach more than half of Belgium's residents. Over 150,000 video recorders are said to be in use. Belgium had 4.1 million phones in service at the end of 1983.

The publications sector is

surprisingly vital for a country of Belgium's size. Belgians can choose from 35 dailies and more than 160 weekly and other newspapers. Advertiser-oriented free sheets number about 450. Consumer magazines range over 110 titles. An astonishing 1,200 trade and technical magazines are available.

Of the $15 million spent annually on advertising in the Belgian media, standard newspapers, including financial dailies in French and Flemish, and consumer magazines each account for about 26 percent. The free sheets absorb 14 percent, other magazines about 5.5 percent, and TV a little over 10 percent (RTL and nonbrand commercials). Outdoor and transportation advertising combined take up 16 percent of all spending on advertising.

Belgium's roads are well developed, thanks in large measure to extensive post-World War II expressway construction. In 1982, expressways ran nearly 1,400 kilometers, accounting for about one-tenth of the total road system. More than 3.3 million private cars were in operation in 1984, but new car registrations the previous year dropped about 6,000 compared with 1982, establishing a nine-year low.

The nationalized rail network is one of Western Europe's most extensive despite a drop in total kilometers from 5,127 in 1938 to 3,842 in 1983, when it still employed more than 63,000 persons. Belgium is an important hub for international rail travel linking, for instance, Amsterdam with Paris via Antwerp, Brussels, and Mons.

Trolley cars clank and sway their way around and under the country's principal urban centers like Antwerp and Brussels, which also have rapid-transit rail and bus suburban commuter links and relatively new subways.

SOURCES OF INFORMATION

Belgium's Institut National de Statistique, rue de Louvain, 44, B-1000 Brussels, to date has published several volumes analyzing in French and Flemish the results of the last census. Among them:

Atlas Statistique du Recensement de la Population et des Logements 1981 Partie 1: Donnees demographiques (Statistical Atlas of the 1981 Census of Population and Housing. Part 1: Demographics): This document summarizes the general population, its composition by age and nationality, and its evolution of households by size and married occupants. The volume comes with four transparent overlays of arrondissements, cities, provinces, and regions for use in conjunction with numerous computer-designed maps of the country which graphically depict the accompanying text. A large number of pyramids concerned with various population aspects completes this 122-page volume. It costs 250 Belgian francs (BF), or about $5.50.

Tome 1--Chiffres de la Population (Volume 1--Population Figures) goes into great detail on the population down to the commune level and highlights statistics of each census since the first in 1846. Among illustrations are maps in two colors showing population migration within the country since 1900 and its evolution from 1970 to 1981. It costs 420 BF, or about $9.30.

Where they live Belgium's inhabitants, 1981

Regions	*Population*	*Percentage of total population*	*Provinces*	*Population*	*Percentage of total population*
Brussels	997,293	10.1	Anvers	1,569,876	15.9
Flanders	5,630,129	57.2	Brabant	2,221,222	22.5
Wallonia	3,221,225	32.7	Hainaut	1,301,477	13.2
German-speaking Wallonia	64,914	0.7	Liege	999,413	10.1
Total	9,848,647	100.00	Limbourg	716,888	7.2
			Luxembourg	221,926	2.2
			Namur	407,400	4.1
			Flandre Orientale	1,331,192	13.5
			Flandre Occidentale	1,079,253	10.9
			Total	9,848,647	100.0

Big city lineup How big Belgian cities fit in the national landscape

City *Arrondissement* *Province*	*1981 Population Total*	*Percentage in arrondissement and province*	*Density per square kilometer*
Bruxelles	997,293		6,164
Brabant Province	2,221,222	45	661
Anvers	501,261		2,364
Arr. of Anvers	918,146	55	917
Anvers Province	1,569,876	32	547
Gand	239,256		1,530
Arr. of Gand	485,565	49	514
Flandre Orientale Province	1,331,192	18	446
Charleroi	222,343		2,172
Arr. of Charleroi	443,832	50	799
Hainaut Province	301,477	17	343
Liege	214,119		3,079
Arr. of Liege	605,123	35	759
Liege Province	999,413	21	258
Bruges	118,020		921
Arr. of Bruges	254,221	46	390
Flandre Occidentale Province	1,079,253	11	344
Namur	102,321		583
Arr. of Namur	261,054	39	224
Namur Province	407,400	25	111
Total population of cities	2,394,613		

TIPS ON TRADE

Japan's Famicon Fever

Move over Hello Kitty. You too Ultraman. Famicon, Japan's new high-tech sensation, is now the most popular toy ever to be made in Asia's electronics wonderland.

With over 7 million of these TV game computers sold since 1983, Nintendo Company is racing to keep up with demand, while other manufacturers crowd the market with look-alikes trying to cash in on what's being called the "Famicon (family computer) phenomenon."

Famicon costs about $82. Software is sold separately in plug-in cartridges and magnetic disks. Nintendo's best-selling game, "Super Mario Brothers," netted the company about $68 million and spawned a best-selling book *How to Win at Super Mario Brothers*.

Why such a smash? Industry analysts in Japan feel that Famicon's appeal comes from users feeling in command while being challenged to perform. Users tend to be children between the ages of 7 and 15.

Nintendo intends to keep challenging its customers as they age. Its next step is to network its over 6 million users to a central computer over telephone lines for a full range of new media services.

Big Blue Beats Japanese Giants

A survey of 1,500 Japanese companies found IBM's model 5550 favored over Fujitsu's 9495 series and NEC's 9800 series. Big Blue now holds a 24 percent share of the PC market in Japan.

The survey also found that experimentation with different brands of computers is waning in Japan. Of the companies surveyed, 71 percent were using only one type of computer, as compared with about 42 percent last year. *Source: JETRO*

Resultats Generaux--Age, sexe, etat civil (marital status), nationalite et menages (households) treats these categories from the national to commune level. It costs 200 BF, or about $4.50.

Resultats Generaux--Logements: The same approach as above for housing. It costs 300 BF, or about $6.60.

Enquete sur les Budgets des Menages 1978-79: Published in 1984, this study gives some insight into household budgeting for the country as a whole, and includes statistics by dwelling size and number of working heads of household. It costs 300 BF, or about $6.60.

Perspectives de Population, 1981-2025 projects Belgium's declining population trend over the coming four decades according to age by regions, including that of Brussels. It costs 300 BF, or about $6.60.

INS also publishes an exhaustive statistical yearbook, *Annuaire statistique de la Belgique*, the most recent one being for 1984 at 900 BF, or about $19.80, and a 228-page paperback version, *Annuaire statistique de poche*, an excellent summary of vital statistics. It costs 160 BF, or about $3.50. An eight-page pocket-size statistical overview is free--as is the INS catalog giving prices for additional census documents and a wide range of other publications. Contact the Brussels office INS by phone at (02) 513 96 50.

The monthly *Bulletin of the Banque Nationale de Belgique* provides a well-documented running tabulation on the country's economy, including relevant demographic data. Of superb quality, it can be obtained by annual subscription (1,450 BF, or $32 by air; 650 BF, or about $15, by surface) or by the number (145 BF, or about $3; and 65 BF, or about $1.50). Write to the bank at boulevard de Berlaimont, 5, B-1000 Brussels.

An amply documented 75-page statistical study of the Brussels region is published by Agglomeration de Bruxelles, Service de Documentation, rue de la Loi, 15, Bte No. 101, B-1040. Write concerning current availability and cost.

"Europe's Population--Major Trends and Implications," issued by the Conference Board in Europe, is useful despite its 1980 publication date for the trends it spots in Belgium and the comparisons it makes with 15 other countries. Copies are available from the Board's New York City or Ottawa offices, or write the Brussels office at avenue Louise, 326, Bte 48, B-1050.

The French-language daily *Le Soir* published four articles during the summer of 1982 looking into initial results of the previous year's census. The series at 64 BF, or about $1.50, plus postage is available from the newspaper's back-number service at place de Louvain, 21, B-1000 Brussels.

The Belgian-American Chamber of Commerce, 50 Rockefeller Plaza, New York, NY 10020, in previous years has published a directory of more than 1,500 U.S. companies doing business in Belgium. Ask, too, about the monthly *Belgian-American Trade Review*.

In addition to the substantial business and general-interest press--in some cases publications offer separate editions in French and Flemish--the large English-speaking community supports *The Bulletin*, a general-interest weekly, and a newer sister monthly, *Prospects*, focusing on Belgian business. Annual introductory subscription for the former is 1800 BF, or about $40, and for the latter 800 BF, or about $18. Write to Ackroyd Publications, avenue Louise, 382, B-1050 Brussels.

The Comite Belge de la Distribution, rue Marianne, 34, B-1180 Brussels, can furnish specific trade information. An annual survey of Belgian media is compiled by the Centre d'Information sur les Media, Galerie Agora, bureau 110, rue Marche aux Herbes 105, bte 6, B-1000 Brussels. *--Peter Inserra*

DESKTOP DEMOGRAPHICS

Demo-graphics

This is the first in a series of reports that review and examine new personal computer products for displaying and analyzing international demographic data.

Hit a few keys on your IBM PC or Apple and see Sweden's age structure in 1985. Hit a few more and see it in 2025, or compared to Brazil's age structure.

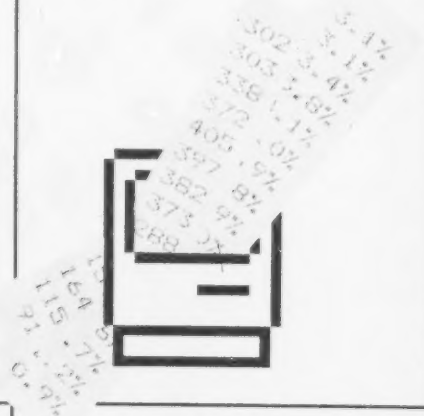
Demo-graphics is a program that projects population for 146 countries from 1975 to 2125. The software and data are on one floppy disk. The program is menu-driven and almost self-explanatory.

You can display population pyramids of one or two countries, rectilinear line graphs of various demographic indicators for one or two countries, and sequential line plots showing several projection series for one country.

Demo-graphics has built-in assumptions that produce the projections, but you can change them to see what alternative scenarios hold in store for different regions. You can change seven assumptions for any five-year period from 1975 to 2125--total population, age-specific fertility and mortality rates, age groups, total fertility rate, infant and child mortality rates, and life expectancy at birth. In most cases, you have to enter the data by sex.

The program has room for 78 extra "countries," which you can add yourself. These can be any geographic area, of course, such as states or cities. To create a new country, you have to enter the total male and female population, percent males and females in each five-year group, age-specific mortality rates for men and women, the sex ratio at birth, and age-specific fertility rates for women aged 15-44. If you don't have the data for a region, you can copy one that is similar to it and change the data according to what you do know. For example, you could assume that a state's fertility and mortality rates are the same as for the country as a whole and edit only the population and age distribution data that you can obtain.

Demo-graphics is published by COMPress, P.O. Box 102, Wentworth, NH 03282. It costs $95 and runs on an IBM PC or compatible with 128K RAM. An Apple version is available for $85 from CONDUIT, P.O. Box 388k, Iowa City, IA 52244. •



FEATURE

Canadian smokers

One in three Canadians smokes daily and an additional 3 million non-smoking adults live with someone who smokes. That adds up to nearly half of the Canadian population breathing smokey air at home and work.

Canadian men are more likely than women to smoke at all ages, except for ages 15 to 24. Thirty percent of women aged 15 to 24 smoke daily, compared to 27 percent of men.

These findings are based on preliminary data from Statistics Canada's new annual General Social Survey. The first GSS, conducted in September 1985, collected data on adult health and social support for the elderly. About 11,000 people aged 15 and over from 11 provinces were interviewed.

Despite bad news on smoking adults, four out of five Canadians describe their health as "excellent" or "good." In addition, the same proportion of Canadians drink alcoholic beverages as in 1978. Sixty-three percent drink alcohol at least once a month, with men at all ages more likely to do so than women (74 percent versus 53 percent).

Elderly Canadians are a spry lot, according to survey findings. Only one in ten of the over 65 set said their health was "poor." About one in six provide such services as babysitting or transportation outside their own household. Of those over 55 who were not institutionalized, most were able to carry out daily activities such as light housework and grocery shopping. However, heavy housework and yard work were no-no's for 3 out of 10 in the over-55 set.

For more detailed information on the 1985 GSS, contact Janet Hagey (613-991-2572) or Gareth Jones (613-990-9293) at Statistics Canada's Housing, Family and Social Statistics Division. A detailed report on the first GSS is to be released in February 1987. A set of preliminary tables and a public-use microdata file are now available. •

REGIONS

EUROPE

When down means up in Southern Europe

Keeping up with Northern European neighbors hasn't always been an uphill fight for Europe's southerners. Italy, Greece, Spain, and Portugal have maintained a continuous if not bumpy fall in their fertility rates from the 1930s onward, completing in the past 10 years the demographic transition Northwest Europe put aside 30 years before.

Italy's 1986 fertility rate--the average number of children a woman will bear in her childbearing years--is 1.5, equaling the average for all of Western Europe, and just below the average for all of Southern Europe of 1.8. Spain's fertility rate of 1.8 is slightly lower than Greece's at 1.9 and Portugal's at 2.0.

In the southern part of Europe, only Turkey, with its higher death rate and higher fertility, still hangs on to a large-family tradition. Turkey's 1986 fertility rate at 5.1 exceeds the average rate of 4.6 for Western Asia.

West Germany

West Germany is the world's 13th most populous country with 60.7 million people. About 4.4 million of these people were resident aliens at the end of 1985, an increase of 1 percent over the previous year.

This increase interrupted a downward trend since 1982. Part of the increase was due to greater numbers of persons, especially Asians, seeking asylum--about 74,000 in 1985, nearly twice the 1984 total. The continued high birthrate among foreign residents relative to that of the native population was also cited as a cause by West Germany's Federal Bureau of Statistics.

In other news, the number of unemployed persons dropped below the 2.1 million level for the first time since June 1983. The jobless rate dropped from 8.7 percent in June 1985 to 8.5 percent in May 1986 and 8.4 percent in June 1986, according to the Federal Labor Agency. There were 43 percent more job openings this June than in June 1985. New jobs helped decrease unemployment among foreign residents by about 5,000 to 235,000, but teenage unemployment increased about 7,000 to almost 125,000.

Proportion of French under 20 declines

The population of France increased by an estimated 218,000 people in 1985, reaching just over 55 million. This rise was accompanied by a decline in the percentage of the population under 20 and a gain in the share of those 65 and older.

According to the Institut National de la Statistique et des Etudes Economiques, those under 20 dropped from 29.1 percent of the total population in 1984 to 28.8 percent in 1985, while those in the 65 and over category rose from 12.8 percent to 13.1 percent during the same period. The overall population rise was a factor of an estimated 768,000 births and 550,000 deaths.

France continues to have fewer officially recorded marriages--273,000 during 1985 versus 281,000 the year previous and 300,000 in 1983. The country's fertility rate rose from 1.81 in 1984 to 1.82 in 1985. The estimated birthrate in 1984 of 13.9 per 1,000 (up 0.1 from 1983) was still below that in 1980 and 1981 of 14.9 and 14.6 in the census year of 1982.

A surprising finding was the slight increase in infant mortality in 1985, estimated at 8.3 per 1,000 births, compared to 8.2 per 1,000 in 1984. However, both these figures are significantly lower than the 10 per 1,000 recorded in 1980.

Urban population loss slows in France

New data from France's Institut National de la Statistique et des Etudes Economiques reveal that large population movements away from major urban centers toward smaller cities and semi-rural areas have slowed significantly.

The Paris metropolitan area, for example, experienced a loss of 110,000 persons aged 14 and older in 1984 and added some 105,000. In contrast, during the period from 1975 to 1982, it lost an average of about 150,000 annually.

The story is similar in the economically hard-hit eastern part of the country. In the Franche-Comte and Lorraine areas, where a declining steel industry raised unemployment and prompted job seekers to look elsewhere, out-migration in 1984 amounted to only 15,000 people.

Arrivals in urban areas under 20,000 inhabitants taken together from outside departments (an administrative designation) tumbled during 1984 from 71,000 to 48,000. Semi-rural areas, on the other hand,

are maintaining population gains.

The population outflows many cities in the West began undergoing in the 1970s are also lessening in countries other than France, including Belgium, Holland, and the U.S.

Italy's submerged workers

Three and a half million Italians in 1983 with no official employment relationship reportedly have some kind of subsidiary occupation, according to Italy's Central Statistical Office. Although receiving money from the wage equalization fund, these submerged workers either do work at home, are not bound by contract, work second or third jobs, or engage in other kinds of work not recorded by the government in official records.

Workers whose work goes unreported to the government are concentrated in Lombardy (780,000), in Campania (426,000), and in Latium (400,000). The North accounts for 46 percent of the total.

NORTH AMERICA

More married Canadian women work

Married women in Canada are joining the labor force in ever increasing numbers. What's more, growth in labor force participation for women with children outpaces that for any other group.

Between 1977 and 1985, the number of married women in the labor force grew by 38 percent, although the total number of married Canadian women increased only by 11 percent. The number of women with children under the age of three--an estimated 315,000 of whom were in the labor force in 1977--grew to 520,000 in 1985. This 65 percent increase outstripped that for married women and the 7 percent increase for married men.

More information on the trend towards increasing participation of women in the labor force and its impact on the Canadian labor force can be obtained in *Family Characteristics and Labor Force Activity, Annual Average 1977-84* (71-533) for $33 from Statistics Canada, Publication Sales and Services, Ottawa, Ontario, Canada K1A OT6.

Lone-parent families up

Canadian men and women are increasingly facing the reality of being lone parents. More men and women in 1985 were heading lone-parent families than ever before, with nearly equal rates of increase for both sexes.

Between 1977 and 1985, the number of single-parent families in Canada headed by women increased from 561,000 to 779,000, a 39 percent increase over the period. The men were not far behind. The number of men heading lone-parent families increased 32 percent from 158,000 to 209,000.

Canadian wives and their work

If you're married, Canadian, and a woman, you've got a fifty-fifty chance of being employed; if employed, you've got a one in four chance that your job is part-time.

In 1985, the number of working wives nearly equaled the number who were unemployed--2,879,000 versus 2,954,000. An estimated 21 percent of working wives were part-time workers, compared to only 3 percent of husbands.

Canada's metros thrive

Canada's census metropolitan areas (CMAs) are thriving. Almost all showed increases during the period June 1983 to May 1984.

Several CMAs showed high annual growth rates: Ashawa (3.2 percent); Saskatoon (2.3 percent); and Vancouver (2 percent). The overall population growth rate in 1983-84 for all CMAs equaled that for the total population of Canada of 1 percent.

As of June 1984, just over 56 percent of Canada's population (about 14 million) lived in CMAs. Toronto, Montreal, and Vancouver accounted for 52 percent of the total CMA population.

ASIA PACIFIC

Darwin and Canberra outpace other capital cities

Preliminary estimates of the capital city populations at June 1985 show that Darwin and Canberra have the highest current growth rates (3.6 percent and 3.4 percent, respectively). They are followed by Perth (1.8 percent), Hobart (1.4 percent), Sydney (1 percent), Brisbane (0.9 percent), Melbourne (0.9 percent), and Adelaide (0.7 percent). The population of Perth passed 1 million in 1985.

The estimated population of Australia in September 1985 was about 15.9 million, an increase of about 200,000 or 1.3 percent over the population count for the previous year. Of this growth, 63 percent came through natural increase (123,000), with overseas migration (72,000) contributing the remaining 37 percent.

Australia's population growth rate of 1.3 percent is higher than for the previous 12 months due mainly to increased gains from overseas migration, which rose from 47,000 in the year ended September 1984 to 72,000 in the same twelve months ending September 1985. •

COMING UP

Hot, new businesses in Japan
Montreal--French? English? Business must straddle the line
London boroughs--future winners and losers

FEATURE

Work hard, play hard--how the Japanese spend their leisure hours

Nowhere is work more sacrosanct than in Japan. Workers rarely take their full vacation days and Western-style, week or two long vacations are unheard of.

The average Japanese worker clocks in 454 more hours a year than a German , 429 more than a French worker, 285 more than an American, and 249 more than an Englishman. What's more, the Japanese worker only gets 10 paid vacation days in contrast to the 30 a German receives and the 20 an American enjoys.

Taking a long vacation a la the West is all but unthinkable. (The longest break a worker gets is the five-day New Years holiday.) No one wants to put down their burden for fellow workers to take up. Japanese workers take an average of 14 days off a year, using only 60 percent of their paid vacation days on average. Japanese workers only out-leisure their Western counterparts in the number of special holidays they receive, 18 a year as opposed to 9 in the U.S. and 10 in Germany and France.

But working hard doesn't preclude playing just as hard, especially for Japan's new leisure-oriented *naisu midi* (middle-aged women) and growing "silver generation." These groups now support over 40 culture centers in Tokyo alone. These commercial leisure centers sell "self-improvement" in the form of such classes as *bonsai* making, classical calligraphy, and flower arranging. Senior citizen sports centers are also booming.

Leisure is becoming such a hot topic that Japan has a special organization to monitor trends in having fun. The Japan Leisure Development Center annually ranks the top 20 Japanese pastimes. Here's its list for 1986.

Japanese pastimes

activity	participants in millions
1. Eating out	54.7
2. Driving	49.1
3. Domestic sight-seeing and travel	45.3
4. Drinking at bars, pubs, etc.	40.3
5. Swimming (at a beach)	37.9
6. Playing cards	37.1
7. Exercising	35.8
8. Visiting museums, gardens, zoos	33.9
9. Visiting parks	33.2
10. Gardening	32.0
11. Picnics, hikes, walks	30.5
12. Movies	30.4
13. Bowling	28.2
14. Pachinko (pinball)	27.5
15. Jogging, running	27.3
16. Music	26.0
17. Sewing, weaving, embroidery	25.2
18. Trips to hometown	25.1
19. Sing-a-long bars	25.1
20. Swimming at a pool	24.9

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